

New Jersey Financial Aid Management System (NJFAMS)

EOF Selection, Awarding and Certification Process

The following information is intended to provide EOF campus programs with instructions on how to select, award, and certify identified EOF eligible candidates during the academic year. The EOF selection, awarding and certification process is a three step process. The first two steps (selection and awarding) can only occur within the EOF portal. The final step (certification) must occur within the institution's Financial Aid portal of NJFAMS. The EOF portal is a separate part of NJFAMS. Access to the EOF portal is facilitated by OSHE/EOF. It is the responsibility of the EOF campus program director to monitor, identify and submit to the OSHE/EOF office a list of who should be granted access to the EOF portal. EOF campus program directors should also be aware that each participating institution's Financial Aid Office (FAO) only has access to its institutional portal within NJFAMS and will need to be provided access to the EOF portal at the request of the campus EOF program director.

<u>General Summary of the EOF selection, awarding, and certification process</u>

Step 1: Within the EOF portal of NJFAMS, the EOF campus program must review, select and award each candidate that will be supported during the academic year. Details regarding how to complete this process are contained within this document on pages 2 – 11. After this process has been completed, the EOF campus program must submit to OSHE/EOF a signed certification sheet and a copy of the program's "Approved and Eligible" roster. This roster should contain the list of EOF eligible students that the campus program is seeking to support.

Step 2: Once the signed certification sheet and reviewed EOF "Approved and Eligible" roster has been received by OSHE/EOF, the OSHE/EOF office will review each candidate and move those students that the EOF campus program has given an Academic Year (AY) Article III undergraduate grant from a "Qualified" status to "Awarded" status.

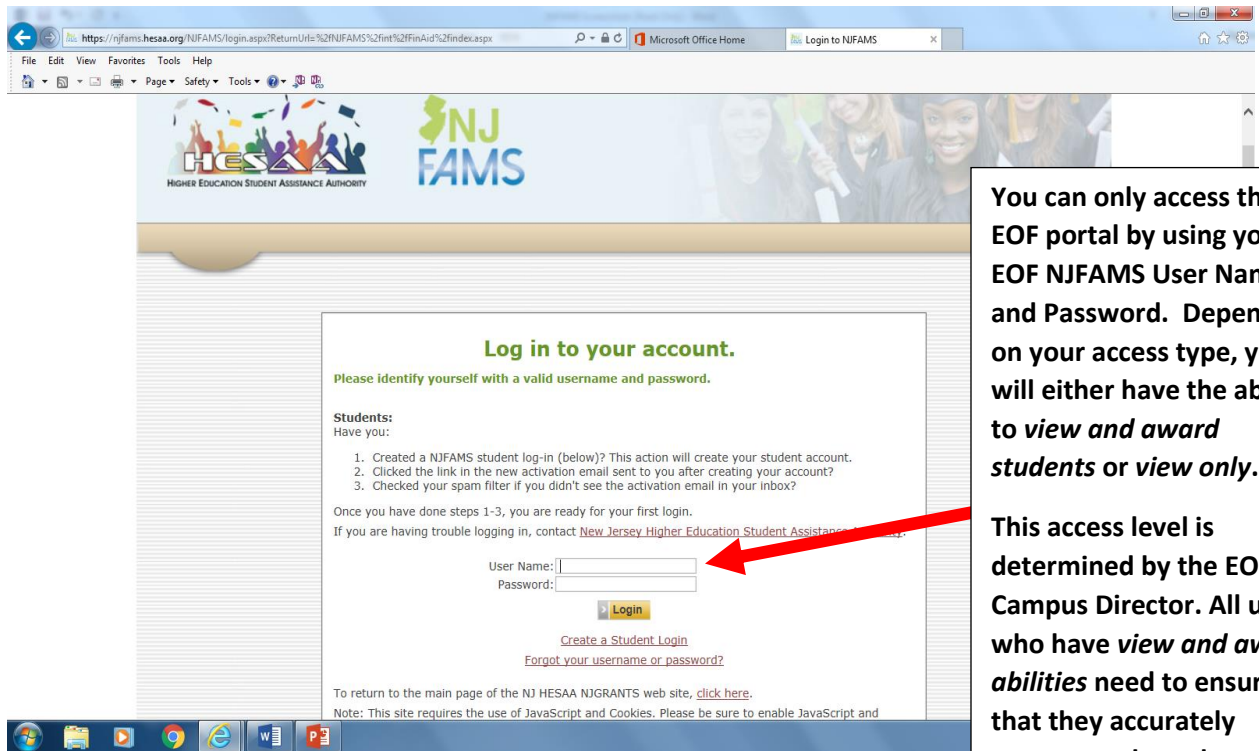
Step 3: After the OSHE/EOF office has completed its review and processing of a program's roster, the EOF campus director must work with the Financial Aid Office (FAO) at their institution to complete the final step of the certification process. This step can only be completed within the institution's FAO portal of NJFAMS. Details regarding how to complete this process can be found on pages 12 – 14.

I. Selecting and Awarding Students within NJFAMS

1. Access the EOF portal within NJFAMS by using the login credentials provided to your program by OSHE/EOF. User access must be provided by OSHE/EOF. Only the EOF campus program director can select which individuals at their institution may be granted access to the EOF portal (this includes members of the Financial Aid Office (FAO)). For any new EOF Directors, to obtain access, please contact Ms. Shakia Williams at shakia.williams@oshe.nj.gov.

All users with EOF portal access can enter the EOF region by visiting the following webpage:

<https://njfams.hesaa.org/NJFAMS/login.aspx?ReturnUrl=%2fNJFAMS%2fint%2fFinAid%2findex.aspx>

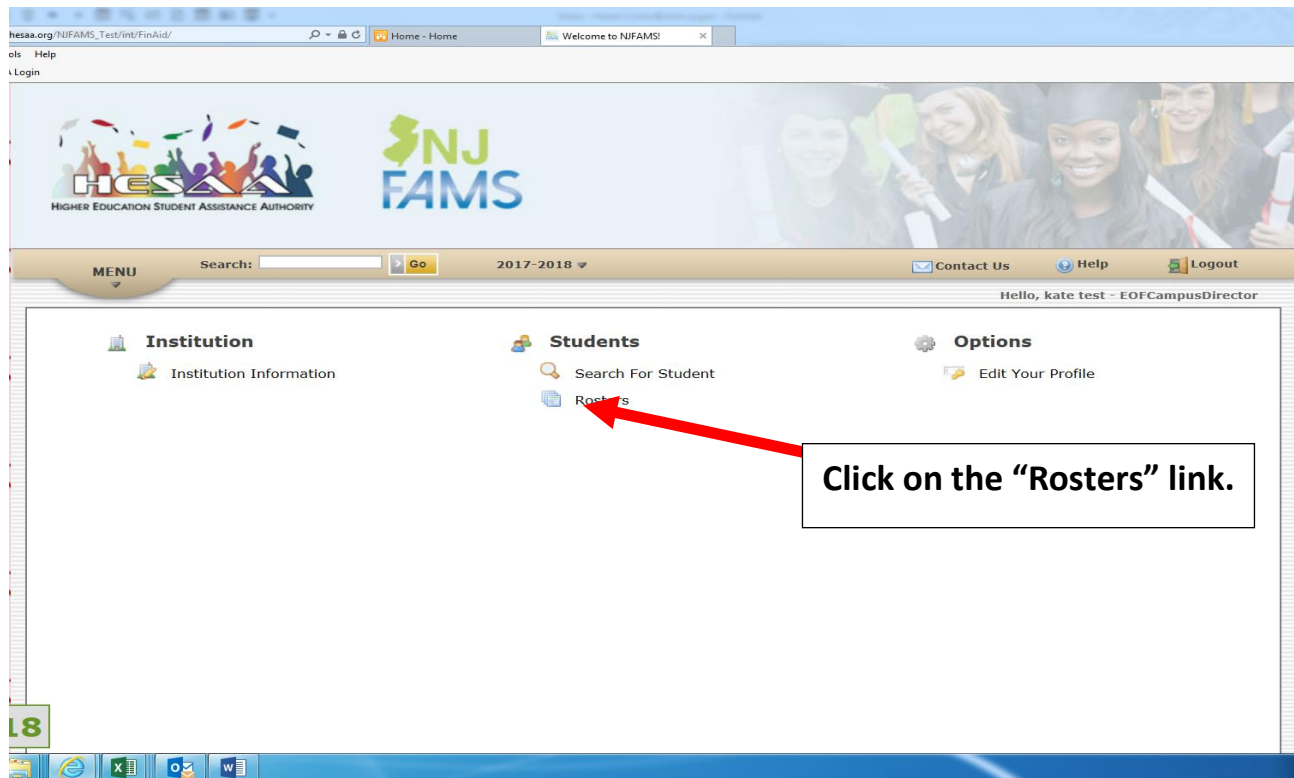


The screenshot shows a web browser window displaying the NJFAMS login page. The page header includes the HESAA logo and the NJFAMS logo. The main content area is titled "Log in to your account." and contains instructions for students. A red arrow points to the "User Name:" input field. Below the input fields are links for "Create a Student Login" and "Forgot your username or password?".

You can only access the EOF portal by using your EOF NJFAMS User Name and Password. Depending on your access type, you will either have the ability to *view and award students* or *view only*.

This access level is determined by the EOF Campus Director. All users who have *view and award abilities* need to ensure that they accurately process each student.

2. Once you log in to the EOF Portal within NJFAMS, you will be directed to a screen that looks similar to the one below. Within the “Students” region, click on the “Rosters” link.



- Once you click on the “Rosters” link, you should be redirected to a page that looks like the one below.

On this page you will need to select the appropriate options:

- School Program (if applicable)
- “All Terms” within the Term field.

Additionally, to find and award a specific student, you should include the student’s first and last name, SSN or HESAA ID#. Once you have included this information, under the “Information Rosters” section, go to the “All Students” roster and click on the ‘online’ link under the ‘view online’ column.

There is action you must take for the rosters in the Certification Rosters section. The rosters in the Informational Rosters section are for reference and reporting purposes.

School Program:

Term:

SSN:

First Name:










Last Name:

Student ID:

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Approved, Eligible and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download
 All Students	PDF	Online	Download










Note: For institutions with more than one EOF program, in order to locate your program's identified EOF eligible renewal and initial students, you may need to select the "All School Programs" option from the School Program drop down menu. This menu box should appear directly above the "Term" box. In addition, you will need to select the "All Terms" option from the Term drop down menu.

Roster Clarification:

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Approved, Eligible and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download
 All Students	PDF	Online	Download

EOF Approval roster: Contains a list of students who meet the EOF income eligibility requirements for the current academic year based off of the information provided on the student's FAFSA. Per the EOF regulations, campus programs are required to obtain and review the appropriate financial documentation to determine a history of poverty and financial eligibility. A copy of this information must be kept of file for audit purposes. Students found on the "EOF Approval" roster must still be reviewed for all other EOF eligibility requirements. If a student does not meet all of the eligibility requirements for the EOF program at your institution then the student should not be selected.

Approved and Eligible roster: This roster is often referred to as the "EOF campus program roster". It contains a list of renewal students who appeared on a program's roster during the Fall term of the previous academic year and any initials that have been awarded.

State Verification Not Complete roster: Students who have been selected for verification by HESAA and are not complete.

Approved, Eligible and Certified roster: Students who have been awarded and certified to receive a grant award.

Certified and Not Paid roster: Students who have been certified but have not been processed to “Paid” status within NJFAMS. Institutions/programs must ensure that a payment request has been made by the identified deadline for students who appear on this list to be processed by OSHE/EOF.

Paid roster: Students who have been processed and moved to “Paid” status within NJFAMS.

Refund Due roster: Students who appear on this roster were processed as “Paid” but subsequently either had their award amount reduced or cancelled. For EOF purposes, this roster should not be used to reflect if a refund is actually due to OSHE/EOF. The reason for this is because OSHE/EOF may have already off-set any refunds due in a subsequent payment to the institution. Institutions should contact their EOF program liaison to confirm if a refund is due to OSHE/EOF. All refunds must be remitted to OSHE/EOF. **DO NOT SEND ANY EOF REFUNDS TO HESAA.**

Ineligible roster: While this roster largely contains students who do not meet one or more of the state’s eligibility requirements for EOF, there are some students who may qualify for EOF but must be submitted as either a discretionary or non-funded appeal. Please see EOF eligibility guidelines for further information.








Incomplete roster: Students whose HESAA application/profile is incomplete.

All Students roster: This roster contains all students at the institution. For ease of locating a student, this is the roster that programs should use when searching for a student.

4. Once you have located a student on one of the identified rosters, you should see a screen similar to the one below. Where the black box is located is where you should see the names of the students.

Program: All Programs
Academic Year: 2017-2018
Term: All Terms

Previous Page 1 Next (expand all) (contract all)

		(view)
		(view)
		(view)
	(Fall)	(view)
	(Spring)	(view)
	(Fall)	(view)
	(Spring)	(view)

Click here to expand a student’s award information.

5. As you identify each student who you plan to enroll in your program, enter their demographic information (i.e. housing, admission type, ethnicity, gender, historical poverty code, etc.). Renewal students *may already* have an EOF award listed within the EOF Term Amount box. You must ensure that the award matches the award level that the student is eligible to receive based on their enrollment (full-time vs. part-time) and housing status (residential vs. commuter). Once you have double checked to

make sure that all of the demographic and award information is correct, select that the student is approved by clicking on the “EOF Approved” box and press the “SAVE” button in the bottom left corner. **You will need to repeat this step for both the Fall and the Spring term for each student.** Once you press “SAVE”, the award information will show up on the student’s NJFAMS screen immediately. Additionally, the student’s term information will be moved from the “EOF Approval” Roster to the “Approved and Eligible” Informational Roster.

The screenshot shows the NJFAMS EOF Approval form. Callout boxes provide the following instructions:

- Institutions with multiple EOF programs will need to identify which program the student is affiliated with here.** (Points to the School Program dropdown)
- To approve students, select the approval** (Points to the EOF Approved checkbox)
- Select the appropriate enrollment status.** (Points to the EOF Enrollment Status dropdown)
- Enter the correct EOF Term Amount here.** (Points to the EOF Term Amount input field in the table)
- DO NOT PRESS SAVE UNLESS YOU ARE ABSOLUTELY SURE THE CORRECT AMOUNT IS LISTED.** (Points to the Save button)

The form includes the following fields and table:

Grade Level: 1st year, never attended college
Dependency Status: Independent
Previous College:
Term of First Entry:
Last Funded:

EOF Full-time Awards: 0
EOF Part-time Awards: 0
TAG Full-time Awards: 0
TAG Part-time Awards: 0
Tax Verification Indicator: N

Housing Status: <Choose One>
Admission Type: <Choose One>
Ethnicity: <Choose One>
Gender: Female
Historical Poverty Code: <Choose One>
School Program: <Choose One>
EOF Enrollment Status: <Choose One>
EOF Approved: <Choose One>

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
★		EOF	0	\$0.00	\$0.00	\$0.00
★		TAG		\$1,249.00	\$0.00	\$2,498.00

Save

Students whose Income exceeds the maximum EOF financial eligibility scale, but whose incomes fall within the discretionary range. (This was formerly known as Reject A in the E-administrator system).

Occasionally, you may have a student whose income falls beyond the EOF Income Eligibility Scale, but their income falls within the Maximum Income Eligibility for Discretionary Students scale. As a reminder, please refer to the EOF regulations regarding the selection and awarding of students who fall within this range. In NJFAMS, these students will appear on a programs “Ineligible” roster. After reviewing the student’s income and asset information, if a program believes that the student should be considered for EOF funding, the EOF campus program director may submit an appeal to their EOF program liaison. For more information regarding this process and to receive a copy of the appeal form, please contact your EOF program liaison.

Monitoring your program’s allocation

Programs are only permitted to award up to their current undergraduate Article III grant allocation level. Programs that experience a situation where your enrollment exceeds your allocation can either request their remaining students as non-funded, or can submit an email to their EOF program liaison requesting consideration for additional funding. There is a form that programs must use when seeking to make this request. Please contact your EOF program liaison for a copy of this form. Please be advised, programs may only make this request for student(s) for whom are eligible, not incomplete, or under verification within NJFAMS.

EOF Certification Process










The purpose of the EOF certification process is to ensure that EOF campus programs are accurately evaluating their enrollment and payment requests within NJFAMS. As articulated within the EOF regulations, it is the responsibility of the EOF campus program to ensure that all students who have been selected to receive an EOF Article III Academic Year undergraduate grant have met the eligibility guidelines as articulated within the EOF regulations.

To initiate the EOF certification process, the EOF campus program director must submit both an electronic copy and hard copy of the **EOF certification page** and the associated **Approved and Eligible roster**. The Approved and Eligible roster is located within the EOF portal on NJFAMS and should be downloaded as a CSV file (excel).

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Approved, Eligible and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download
 All Students	PDF	Online	Download

Use the Approved and Eligible CSV file to verify which students your campus EOF program is certifying.

After you have downloaded the CSV file that is associated with your program's "Approved and Eligible" roster, please review the roster carefully to ensure that all of the students are listed properly. If there is a student that does not appear on your downloaded Approved and Eligible-CVS roster but appears on your Approved and Eligible-Online roster, please send an email to your EOF program liaison and include the name and HESAA ID# of these students. Please note, that if it is a matter involving TAG or any other non-EOF items, then you will need to speak with a HESAA representative.

Once you have downloaded and reviewed your Approved and Eligible roster, please remove the following fields when saving and sending both the electronic file and hard copy:

- 1) Program Short Name
- 2) SSN
- 3) Term Award Amount (Do not confuse this with the EOF Term Amount)
- 4) Paid Amount
- 5) Certification Code
- 6) Previous College
- 7) First Term of Entry
- 8) Last Funded
- 9) TAG Full-time Awards
- 10) TAG Part-time Awards
- 11) Tax Verification Indicator
- 12) Ethnicity
- 13) Gender
- 14) School Program
- 15) EOF Approved
- 16) TAG Program Status
- 17) TAG Term Award Amount
- 18) TAG Paid Amount
- 19) TAG Certification Code

You should only send the following information (i.e. the fields listed below) for each student:

1) Student ID, 2) Academic Year, 3) Term Description, 4) School Code, 5) School Name, 6) Last Name, 7) First Name, 8) Birth Date, 9) EOF Term Amount, 10) Grade Level, 11) Dependency Status, 12) # of EOF Full-time Awards, 13) # of EOF Part-time Awards, 14) Admission Type, 15) Housing Status, and 16) Historical Poverty Code

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Student ID	Academic Year	Term Description	School Code	School Name	Last Name	First Name	Birth Date	EOF Term Amount	Grade Level	Dependency Status	EOF Full-time Awards	EOF Part-time Awards	Admission Type	Housing Status	Historical Poverty Code
XXXXX	2017-2018	Fall	9999	A&U UNIV COLLEGE	FGHIJ	ABCDE	6/11/1996	\$75	3rd year/Junior	D	6	0	EOF Renewal	3	Resided in high-distress area
XXXXX	2017-2018	Spring	9999	A&U UNIV COLLEGE	FGHIJ	ABCDE	6/11/1996	\$75	3rd year/Junior	D	6	0	EOF Renewal	3	Resided in high-distress area

The EOF certification page must contain the signature of the EOF program director and the financial aid director. This document is located within the EOF STUDENT PAYMENT PROCESS section on the EOF Campus Program Resources webpage:

http://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml

The certification page must be emailed as a pdf, MSWORD, or jpeg (image) attachment. The Approved and Eligible roster that has been verified for certification must be emailed as an Excel document and a hard copy must be mailed along with the signed EOF certification page.

II. OSHE/EOF Review

Once the EOF campus program has submitted the signed certification page and Approved and Eligible roster, the OSHE/EOF office will begin to review and move each student's status from being "Qualified" to "Awarded". Once a program's roster has been reviewed and processed, programs will be able to certify and request payment. Institutions should refer to the EOF processing calendar on the OSHE/EOF website.

This icon indicates that the student is in a "Qualified" status.



Fall of 2017-2018 Academic Year

Grade Level: 1st year, never attended college Degree Program: 1st bachelor degree Enrollment Status: Full-time SAP: Yes Prior BA: No Prior AA: No Campus ID:

ESL/Remedial: No Graduating This Term: No Type of Leave: None Course of Study: Other Transfer Orders Verified: <Choose One>

Dependency Status: NJEI: 361

Projected Year Change: Tax Verification Indicator: N - Not Selected for State Verification

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text"/>	\$1,250.00	\$0.00	\$2,500.00
	<input type="text"/>	TAG	<input type="text"/>	\$6,343.00	\$0.00	\$12,686.00

> Save

This icon (for EOF purposes) indicates that the student is now in an "Awarded" status.



Fall of 2017-2018 Academic Year

Grade Level: 1st year, never attended college Degree Program: 1st bachelor degree Enrollment Status: Full-time SAP: Yes Prior BA: No Prior AA: No Campus ID:

ESL/Remedial: No Graduating This Term: No Type of Leave: None Course of Study: Other Transfer Orders Verified: <Choose One>

Dependency Status: NJEI: 361

Projected Year Change: Tax Verification Indicator: N - Not Selected for State Verification

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text"/>	\$1,250.00	\$0.00	\$2,500.00
	<input type="text"/>	TAG	<input type="text"/>	\$6,343.00	\$0.00	\$12,686.00

> Save

The students who appear with an EOF grant amount listed on a program's submitted Approved and Eligible roster are the students that the OSHE/EOF office will seek to process.

III. Final Step of the EOF Certification Process: FAO Review and Certification

After the OSHE/EOF office has reviewed and approved a program's roster of students (i.e. moved students from a "Qualified" status to an "Awarded" status) all of these students will now appear on the institution's NJFAMS "Not Yet Certified Roster". **PLEASE NOTE:** EOF campus directors will only have access to the institution's NJFAMS roster if they were provided access by their institution's financial aid officer. If you were provided access, you are using a different username and password to access the institutional NJFAMS rosters.

The next step requires the financial aid officer at each participating institution to certify the enrollment and SAP status of each EOF student who was moved to an "Awarded" status. This action should move the students from the institution's NJFAMS Certification Roster to their "Offered and Certified" roster within the Informational Roster section. The financial aid officer will need to ensure that they are looking for these students within the appropriate roster category/program.

Please ensure that EOF has been selected.

EOF Awarded students should appear here.


Roster Category:

Campus:










Program:

Term:

Certification Rosters - Action Required

	View and Print (PDF)	Certify Online	Download File (CSV)
 Not Yet Certified Roster	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Offered Roster	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Offered and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Application Complete	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download

Within the “Not Yet Certified Roster”, each participating institution’s financial aid officer will need to go in and certify all of the EOF campus program’s “Awarded” students accordingly.

The campus financial aid officer will need to enter the appropriate certification code here to certify.

Fall of 2017-2018 Academic Year

Grade Level: 1st year, never attended college Degree Program: 1st bachelor degree Enrollment Status: Full-time SAP: Yes Prior BA: No Prior AA: No Campus ID:

ESL/Remedial: No Graduating This Term: No Type of Leave: None Course of Study: Other Transfer Orders Verified: <Choose One> NJEI: 361

Dependency Status: Projected Year Change: Tax Verification Indicator: N - Not Selected for State Verification

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text"/>	\$1,250.00	\$0.00	\$2,500.00
	<input type="text"/>	TAG	<input type="text"/>	\$6,343.00	\$0.00	\$12,686.00

> Save

Below is a screenshot of the various certification codes than can be entered. To certify, for EOF purposes, option “A - Certified” should be selected for payment purposes.

Grade Level: 2nd year/sophomore Dependency Status: Dependent

EOF Full-time Awards: 0.5 EOF Part-time Awards: 0

Housing Status: Commuter Admission Type: EOF Renewal

Historical Poverty Code: First-generation college student

Status Certification Codes Program

EOF

TAG

Save

only.

- A - CERTIFIED
- B - NEED LESS THAN AWARD
- C - WITHDREW
- D - REVIEW PENDING
- E - FULLY FUNDED - NO UNMET NEED
- H - PROGRAM NOT ELIGIBLE
- I - NON-MATRICULATED
- J - NOT A STATE RESIDENT
- L - LEAVE OF ABSENCE
- O - LOAN DEFAULT
- P - REFUND OWED
- Q - MANUAL CANCELLATION
- R - HAS NOT DEMONSTRATED COLLEGE READINESS
- V - SELECTED FOR VERIFICATION
- X - DECEASED
- S - SELECTIVE SERVICE
- T - COLLEGE PLACEMENT TEST SCORE
- M - NO HIGH SCHOOL DIPLOMA OR EQUIVALENT
- N - ABOVE INCOME LIMIT
- U - PRIOR AA DEGREE
- W - DOES NOT MEET PROGRAM SAP
- Z - STUDENT REQUIRED AWARD

Last Funded: Fall 2016-2017

Tax Verification Indicator: N

Status: EOF Approved: Eligible for EOF

Once this step has been completed, each certified student should now appear on your institution’s NJFAMS Certified and Awarded roster as being “Awarded” for EOF purposes. This step must be conducted to complete the EOF NJFAMS roster certification process.

Please note: When an institution is attempting to certify an EOF student on the "Not Yet Certified Roster", if the enrollment status being certified does not match the enrollment status approved by the campus EOF office, the following error message will display: "Enrollment Status Does Not Match EOF Approval Enrollment Status." When this occurs, the financial aid officer assisting in the certification process should immediately contact the EOF campus program director. Both offices should review the student’s enrollment status and make the necessary changes that will reflect the accurate enrollment status for the student. Once this correction is made, the certification process can be completed.

FINAL EOF ROSTER CERTIFICATION

At the conclusion of the Fall and Spring term, the Financial Aid Office (FAO) must submit a Final EOF Enrollment Certification page and roster to the OSHE/EOF office. This certification document must be submitted via email to OSHE/EOF. This certification form may be submitted in either a PDF or word format to all identified individuals below. In addition to this form, the Financial Aid Office (FAO) must submit a copy of the institution's EOF roster of "Offered and Certified" students. The "Offered and Certified" roster must be downloaded from the Institution's NJFAMS portal as a CSV file (Excel document) and must accompany this roster certification page. This excel document should include information from all terms and must be reviewed prior to submission and must reflect the accurate demographic, enrollment status, and award information for all selected students. Students who are listed as either incomplete or under verification within NJFAMS should not be included for certification purposes. This information should be kept on record for audit purposes and will be used by the OSHE/EOF office to certify for payment purposes.

The screenshot shows the 'HOME > Roster Selection' page in the NJFAMS system. It includes filters for Roster Category (Institutional), Campus (All Campuses), Program (EOF), and Term (All Terms). Below these are two tables: 'Certification Rosters - Action Required' and 'Informational Rosters'. Red arrows point from text boxes to the 'Program' and 'Term' dropdowns, and to the 'Download' link for the 'Offered and Certified' roster.

HOME > Roster Selection

You are currently working with the **2017-2018** Academic Year.

Roster Category:

Campus:

Program:

Term:

Certification Rosters - Action Required

	View and Print (PDF)	Certify Online	Download File (CSV)
Not Yet Certified Roster	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
Offered Roster	PDF	Online	Download
State Verification Not Complete	PDF	Online	Download
Offered and Certified	PDF	Online	Download
Certified and Not Paid	PDF	Online	Download
Paid	PDF	Online	Download
Refund Due	PDF	Online	Download
Application Complete	PDF	Online	Download

2017-2018

Please ensure that within the Program line, you have "EOF" selected & within the Term line, you have "All Terms" selected.

Download the "Offered and Certified" CSV file and send the file electronically and as a hard copy.

Any questions regarding the EOF NJFAMS Selection, Awarding and Certification process, may be directed to your EOF program liaison.